

Montana Shared Catalog

Inventory Guidelines

Revised January 2012

Contents

Quick Checklist/Getting Started	2
1 Inventory: Step by Step	3
2 Pre-Inventory	3
3 Setup and Scanning	3
3.1.1 Using the Inventory Wizard	4
3.1.2 Offline (Handheld) Scanner	5
4 Inventory Reports	7
4.1 Director's Station	7
4.1.1 Setting up your report in Director's Station	7
4.1.2 Advanced Director's Station Tips	9
4.2 Workflows Reports	10
4.2.1 Workflows Report Setup	10
5 Process Missing Items	12

Quick Checklist/Getting Started *Note: all of these items are covered in more detail later in this document – this is just a checklist to help you plan*

- Pre-Inventory Decisions:
 - Do you want to Reset Inventory? Inventory Reset clears data from Date Inventoried and Number of Times Inventoried Fields
 - Do you want to batch-inventory checked out items? Checked out items can be inventoried automatically by MSC Admins or individually as they are returned
 - Which scanning method will you use? Handheld offline scanners upload files to Workflows after scanning; or scan directly into an open Workflows session using a laptop, or by bringing batches of materials to a stationary computer
- Inventory
 - Scan – Can be done in sections or divisions that work best for your library
- Post Inventory
 - Generate Lists using Workflows Reports or Director's Station Reports to review inventory results
 - Process Missing Items – Use your library's procedure for searching for and dealing with items that were not inventoried

MSC Admins are happy to help with any of these steps and to answer any questions you may have. Please contact us using the MSC@mt.gov or open a ticket at our help desk at [http://msl.mt.gov/For Librarians/Montana Shared Catalog/Support/](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Support/)

1 Inventory: Step by Step

Note: all processes can be run by sections or for your entire collection

2 Pre-Inventory

!!!These steps need to be done BEFORE you start scanning!!!

❖ Inventory Reset - Clearing previous inventory information:

- Your items may have previous inventory information attached to them. MSC Admins can reset the number of times inventoried to 0 and last date inventoried to NEVER. This is not required but can make it easier to generate lists of missing items when you're finished scanning.
- If you want to be able to see how many times various items have been inventoried or track when the last time an item was inventoried, do not request the inventory reset. This may only be useful if you do not remove all missing items after inventory.

❖ Set Inventory Date Report – Inventory on checked out items:

- MSC Admins can run the Set Inventory Date Report to automatically inventory all items that are checked out to actual patrons (excluding missing, trace, claims returned, etc.). This can be done at the beginning and end of scanning to account for items checked out after you start scanning a section.
- If you prefer to inventory currently checked out items as they are returned, then do not have this report run. You may prefer to do this if you want every book handled individually. For example, if you want to check condition of materials while inventorying.

3 Setup and Scanning

There are two different ways to scan the items that you are inventorying. Both methods are described in detail below:

- Use a computer with Workflows and scan into the Inventory Wizard. This can be done with a laptop, a cart of books brought to a desk, or even a wirelessly connected barcode scanner. This method cannot indicate if items are scanned in shelving order.
- Use an offline scanner that is not connected directly to Workflows. An offline scanner stores the barcodes internally until you upload them to a computer.

3.1.1 Using the Inventory Wizard

1. Log in to Workflows using your Circulation login.
2. Click on Circulation Module.
3. Click on the Special Toolbar.
4. Click on the Inventory Item Wizard. If a set properties window opens, click OK, leaving the default settings intact.
5. The Inventory Item Wizard will open.
6. Scan an item into the field for Item ID. It is important to watch the screen while scanning because:
 - a. Alerts pop up for several reasons. If the item has a current status of missing, lost, charged, etc. If an alert appears click ok to close the message before scanning your next item. Hint: you'll want to set up a procedure for dealing with these alerts at your library. For example, you may decide that the item should be put aside for cataloging with a note about type of error.
 - b. If you scan another item with an alert popped up, that scan will close the alert screen and the second item will not be inventoried.
 - c. You can check the call number of the scanned item against the call number on the screen to make sure an item was scanned. If the call number does not match, consider setting the item aside for a cataloger to examine.
 - d. ***If you're not sure an item scanned correctly, you can rescan it. It does not matter if an item gets scanned multiple times.** The Number of Times Inventoried field will be incremented, but the Inventory Reports can all use the Date Item Inventoried field to create their lists of information.
7. Continue scanning each item.
8. You can clear the list and/or close the wizard just like you do with a discharge wizard.

Using the Inventory Wizard in Workflows means that you **do not** have to upload any files when you quit for the day. You simply scan all the items into the Wizard, stop when you need to stop, and pick up where you left off when you begin again. The inventoried status is set the moment the item is scanned.

3.1.2 Offline (Handheld) Scanner

You will need access to the Load Scanned Barcodes report under the All Inventory Tab of the Schedule Reports wizard. Please contact the MSC Admins if you do not have access to this report template.

SirsiDynix supports 3 Intermec handheld scanning devices: Intermec 2410, Intermec Trakker T2090, and Intermec 9440 Trakker. The upload files from these can be loaded directly into Workflows without any special processing.

If your library has a different handheld scanner that you would like to use to perform inventory, please contact the MSC Administrators to determine if it can be used and what processing the upload files will need before loading them into Workflows.

3.1.2.1 Start Scanning:

Scan items using the handheld scanner. Be careful about the data limits with individual scanners – don't scan more barcodes than the scanner can hold. Follow scanner-specific instructions for uploading items to a workstation. You will get these from scanner manufacturer. If you have the Intermec 9440 Trakker you will perform this step during the scanning upload, step 6. If you are using a non Intermec scanner, this is where you would perform the process you received from the MSC administrators to convert the file so it is readable by Workflows. Usually, this is done by editing a spreadsheet. Proceed to Scanning Upload to Workflows to load inventoried barcodes.

3.1.2.2 Upload to Workflows:

1. Log in to Workflows.
2. Click on the Utility Module.
3. Click on the Scanner wizard.
4. If you have an Intermec Scanner you will need to choose the correct scanner. If you have a converted file from a different scanner, choose Intermec 2410.
5. Click Retrieve. A window will pop up, if you have the Intermec 9440 tracker, use this to load the file from the scanner to the workstation. If you have any other kind of scanner, click Exit to close the popup.
6. Use the gadget next to the Directory to select the file you uploaded from the scanner to the workstation.
7. Select your library.
8. Do not change the file name.

9. Click Upload.
10. A pop up window should state that the file was successfully uploaded.
11. Click on the Reports Module.
12. Click the Schedule New Reports wizard.
13. Select the All Inventory tab.
14. Select the 2) Load Scanned Barcodes Report.
15. On the Basic Tab – Edit the Report Name with your library’s name and any other identifying information you need (date, etc.).
16. On the Item Selection tab, **select your library**.
17. On the Count of Transactions Loaded tab you may adjust the settings in the check boxes but leave the Transaction Type as Inventory.
 - a. Check Mis-ordered – prints lists of items not shelved in order, with titles of neighboring items so they can be located.
 - b. Check Unknown – prints a list of item ids that are not cataloged, with title of neighboring item so they can be located.
 - c. Use Short Form – limits printed list to just Call Number, Copy Number, and Barcode. Uncheck this box if you want the Title, Author, Library, and Home Location to print.
18. Run the report.
19. Select the Finished Reports wizard to verify that the report completed successfully. You may want to double check a few items to make sure that their Last Inventoried dates were correctly updated.

4 Inventory Reports

You may want different reports depending on what kind of information you are looking for. The MSC Admins strongly encourage exploring the Director's Station option, as it is much faster and easier to get exactly the information you need. Keep in mind that Director's Station data is at least one day old, so inventoried items will not be available on Director's Station until the next day.

4.1 Director's Station

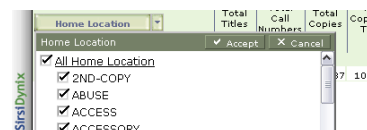
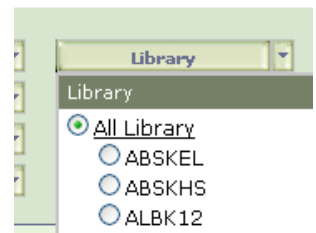
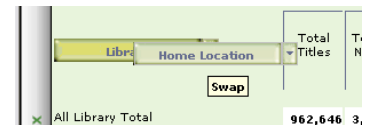
Director's Station is an alternative to running the Inventory Reports in Workflows. Workflows reports are lengthy and may take a while to run. Also, Director's Station reports can be exported into a spreadsheet and edited.

Hint: your inventory may have been done by Item Type or Home Location or another way. The directions will say Home Location, but feel free to adapt that to whatever system works best for you and your staff.

4.1.1 Setting up your report in Director's Station

Hint: after you have performed the following steps once, you can save the report in Director's Station and access it through "My Folder". Then you can skip directly to step # 16.

1. Log in to Director's Station. Click the Grey Bar on the left side of the screen to open the Menu.
2. Click on Collection Analysis.
3. Click on All Measures All Modules
4. Click on All Catalog Measures.
5. Click the Grey Bar again to minimize the menu.
6. In the pool, click and drag the bar labeled Home Location down to where the bar that says Library. Hover directly over the Library bar until you see the word Swap and release the mouse button.
7. In the pool, find the bar labeled Library. Click the down arrow on the right side of the bar and select the button next to your library. Click the Accept Button.
8. In the pool, next to the Library bar, it should have your library's name out to the right.
9. Below, where the Home Location bar is, click the down arrow on the right side of the bar.
10. The screen that opens up has a list of all the home locations the MSC uses. Uncheck the box that is next to All Home Locations. Click the Accept Button.
11. The list of Home Locations that your library uses will appear. This sometimes takes a few minutes to load.



12. Once it has loaded, in the pool find the Date Copy Inventoried bar and pull it down to the Home Location bar. Hover near the bottom of the Library bar until you see the words Insert Below and release the mouse button.

	Total Titles	Total Call Numbers
AUDRECFC	201	202
BIOGRAPHY	363	365
BOARD-BOOK	242	246

13. On the Date Copy Inventoried bar, click the down arrow on the right side of the bar.

14. Uncheck the box next to All Date Copy Inventoried. Click the Accept Button. Again, this will probably take a while to load.

	Total Titles	Total Call Numbers
AUC	201	202
BIC	363	365

Once it has loaded, at the very top of the screen, click Save As. This allows you to name this report and save it in your “My Folder” in Director’s Station. Now that it is saved, you can skip steps 2 – 14.

>>>If you have already saved this report and have loaded it in Director’s Station, start here!

15. Scroll to the Home Location that you have just inventoried. If you do not reset your inventory dates, you might have several years listed. If you do reset, you will probably only see the current year and NEVER.

16. The current year indicates the items that you just inventoried. Any past years or the word Never are the items that have not been inventoried in your latest round. This is the report you need.

Year	Title	Date Copy Inventoried
NEVER		
EASY-BEG		
2007		
2009		
2010		
NEVER		
EASY-CASS		
2010		
EASY-CD		
2010		
NEVER		
FICTION		
2007		
2009		
2010		
NEVER		
ILL		
NEVER		
INPROCESS		
2007		

17. Click and drag to select the sections you want to see. They will be highlighted in yellow.

Release the mouse button and click one of the List Copies by... menu items in the pop up. (It doesn’t matter which you choose because when you export the list into excel, you will probably sort the list into the shelving order)

18. A new window will pop up with the list in it. Depending on how many items are on the list, it may take a while for the list to finish loading.

19. Click the Export button at the top left of the screen.

20. You can open or save the file. At this point it is in .csv format and you will need to make some edits to get a useable print out. Then you can save the file in a different format.

Total Checkouts	Title
11	EVERY DAY IS EARTH DAY

21. The most important change is to set the format for Item ID column as a number so that the whole barcode prints.

22. Other suggested edits are listed below, but you can do whatever works best for your library.

- ❖ moving the call number column to the far left and sorting by that column
- ❖ removing the price column

Item ID	Title	Author	Library	Call Numb	Year	Publi	Item ID	Date Copy	Date Last	Copy	Price
11	EVERY DAY IS EARTH DAY	O'Connor, Me	BELGRAD OCONNO	2010	3	38E+13	5/28/2010	3/16/2011	10		
10	THIS IS M	Mayer, Me	BELGRAD MAYER	2009	3	38E+13	2/13/2010	2/17/2011	15		
9	JUST SAV	Mayer, Me	BELGRAD MAYER	2010	3	38E+13	7/22/2010	3/23/2011	17		
8	LITTLE CR	Mayer, Me	BELGRAD MAYER	2009	3	38E+13	2/13/2010	3/25/2011	17		
7	LION AND	Herman, G	BELGRAD HERMAN	1998	3	38E+13	2/25/2010	3/25/2011	4		
7	CLIFFORD	Endwell, N	BELGRAD BRIDWEL	2010	3	38E+13	7/21/2010	3/3/2011	5		

- ❖ moving or deleting the number of checkouts column so the title is next to the call number
- ❖ turning grid lines on in page setup

4.1.2 Advanced Director's Station Tips

- ❖ If you do inventory more than once a year or need to limit it to more specific dates you can use the down arrow on the Date Copy Inventoried and expand the sections until you're displaying the date ranges you need
- ❖ If you'd like to exclude the current year so you can export a single list that can be done by clicking the down arrow on the Date Copy Inventoried and Uncheck the box next to the current year

4.2 Workflows Reports

There are several different types of inventory reports in Workflows. Please be aware that most of these reports are many pages and take a long time to run.

Remember: ALWAYS limit these reports to YOUR library and enter a date range.

No Workflows reports should be run until you've completed either a section or your entire inventory. Running an inventory list before you have started may result in reports that include your whole collection. If you've chosen not to use the Set Inventory Date report to inventory your checked out items, you should wait to run them until you have the majority of your items scanned or should exclude CHECKEDOUT as item current location.

- ❖ List Items – these reports will create lists of items that have not been inventoried. This will allow you to search your shelves and other locations for these items.

- ❖ Step 3a) Inventory Date BEFORE Report and Step 3b) Inventory Date Never Report have very limited selection options and NO print selection options, but they can be used. They can be found in the Reports module under either the My Inventory Tab or the All Inventory Tab.
 - The Step 3a) Inventory Date BEFORE Report gives a listing of all of the copies that were previously inventoried but were not in the current inventory.
 - The Step 3b) Inventory Date NEVER Report gives a listing of all copies that have NEVER been inventoried.

- ❖ List Inventory by Item Number Report has very similar output to the two Inventory Date reports but it has a lot more selection options so you can narrow your lists down to exactly the collection areas you're working on. It also has print selection options so you can get exactly the information you need on the report.

4.2.1 Workflows Report Setup

To Use any of these list item reports:

1. Log in to Workflows using your Circulation login.
2. Click on Reports Module
3. Click Schedule Reports
4. If the Set Session Settings screen pops up, verify that you have chosen an application to view reports and click OK.
5. The Step 3a & Step 3b reports can be found under the My Inventory tab or the All Inventory tab. The List Inventory by Item Number report can be found under the Bibliographic tab. Click on the name of the report you want to run, then click the Setup & Schedule button at the bottom of the screen.

6. Follow these steps to configure the report options to get the most useful lists,
 - a. For the Step3a & Step 3b reports
 - i. on the Item Selection tab, verify that your library has been filled in.
 - ii. Use the gadget buttons to select the home location and/or current location you'd like to list.
 - iii. In the Step3a, open the gadget for Date inventoried, select the date you began your current inventory and click on the Before button. This will list the items that were inventoried in a previous inventory but did not get scanned during your current inventory.
 - b. For the List Inventory by Item Number
 - i. in the Item Selection tab, use the gadget to select your library.
 - ii. You can either leave blank or set any of the options you'd like in the Title Selection and Call Number Selection tabs, although these may limit your list.
 - iii. In the Item Selection tab use the gadget on the Date Inventoried box, then fill in other options.
 - iv. If you did your inventory in sections by item type or home location, you could fill in the selections in those two fields. (If you did, and want to print the list by section, you'll need to run this report once for each section) then fill in any other options you'd like (again, these will limit your list) To recap – for the basic list of anything that did not get inventoried, fill in only library and date inventoried, (and item type or home location if you did your inventory in sections).
 - v. The sorting tab simply allows you to select the order you'd like the items listed on the report.
 - vi. The print item tab is where you have the most options. The context specific help available in Workflows is very useful for determining which of these options you should select and how they should be configured. **WARNING** – this tab can make the report very long to print depending on your choices. Here are some recommended settings:
 1. Printed Arrangement - Record by Record
 2. Title Information Entry List - Brief. Use the gadget next to the Entry List box. (Full will print the full Bib record for each item.
 3. Call Number information – Call Number Only
 4. Item Information – Brief Copy Information or Abbreviated Copy
 5. MARC Holdings Information – No MARC Holdings

5 Process Missing Items

- Searching – It is sometimes a good idea to have at least one search performed for items that were not inventoried. Your scanning staff may have been interrupted or distracted by patrons. As an example, an entire shelf could be skipped during changes in shift or when scanning is done over several days. Patrons also move items around on shelves, etc. Found items can simply be scanned to update their inventoried status.
- Processing – Items that were not inventoried should be dealt with in some way. This can be whatever procedure works best for your library. Common methods include:
 - Using the Mark Item Missing Wizard. Be sure the properties of this wizard are set up to use your library's missing user. Contact MSC Admins for more information if you do not usually use this wizard or have questions about setup.
 - Checking items out to the TRACE user and follow your library's TRACE procedures.
 - Removing the items from the system entirely using Discard and Delete. Refer to the MSC Cataloging Guidelines at [http://msl.mt.gov/For Librarians/Montana Shared Catalog/Cataloging/](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Cataloging/) for more information on whether Discard or Delete applies.
 - Some combination of the above– Example: mark items Missing, then discard after 6 months.
- If you need guidance on how to deal with discarded, missing, lost, and otherwise problematic items in your catalog, please contact the Montana Shared Catalog Admins at msc@mt.gov.